

Happy New Year!

I would be pleased to assist you with tax preparation this year. Please choose from one of the following convenient options:

By Mail:

Ernest Palmer
EA PO Box 384,
Lewiston, NY 14092.

Mail slot-side door:

(On the side door of the garage)
4335 River Rd.
Youngstown, NY 14174

Just look for the one-story brick house next to the Lewiston Senior Center. (which is at the corner of Pletcher Rd.)

2021 TAX SEASON UPDATE

Ernest Palmer EA



January 2022

(716) 754-9989
epalmer@eptax.com

Please be sure to enclose the completed Tax Worksheet with your documents. Also, please include updated direct deposit information.

******Important COVID Update:**

Due to the virus, face to face appointments at the office will be limited (at least for February)

However, I will be happy to assist you by telephone or through e-mail, if needed.

Thank you for your understanding.

I encourage you to drop off, mail, email or use the secure portal at my website to get your documents to me and I will strive to provide the same level of service you have come to expect.

Pricing:

\$100 base fee for most returns, including 1040, Schedule A, NY State and E-File.

Small business, rentals, investments, stock sales and education credit may require additional pricing. I will invoice the total to you with your packet.

\$20 fee for returns of dependent children (when included with parent's return).

I also do returns for all other States as well as multi-state.

New for 2021: Even if you take the standard deduction, you can claim up to \$300 in cash contributions, \$600 for Married Joint Filers.

Important Info:

Advance Child Tax Credit Payments:

Please include the total amount of Advance payments received from July through December 2021 on the Worksheet. (IRS Letter 6419)

This amount must be reconciled on your return

You will also need to report the amount of the Third Stimulus (Economic Impact Payment) received around March of 2021 (IRS Form 1444-C). For most taxpayers it was \$1400 per person. It is not taxable but must be reconciled on this return.

I normally return your completed packet within a week. It's always a good idea to keep a copy of your paperwork for yourself before delivering items to me.

Please do not enclose copies of previous returns, unless you are a first-time client.

IMPORTANT: (Please Read)

I must have the following information to complete your return:

1. Please enclose the **2021 Tax Worksheet**, along with your W-2's, 1099's, 1098's and other tax information received in January. Also, be sure to provide current bank account information for direct deposit. Without current bank information I cannot provide direct deposit for your refund. Any refund check will be mailed to you. The Worksheet is also available at www.eptax.com. Please do not enclose sales receipts or medical receipts of any kind.
2. If you or your or spouse had your driver's license renewed in 2021, or you are a new client to this office, I will need a copy of both sides of your driver's license for both you and your spouse. Either enclose a copy with your paperwork or email a photo of both sides to epalmer@gmail.com. The same information is required for any children who are filing a return.
3. Worksheets for rental property or small businesses, are available at www.eptax.com.
4. If there is an undergrad college student in the family, you must provide the **Form 1098-T** from the college or university in order to qualify for the American Opportunities Credit.
5. If unemployment was received in 2021, you will have to print the 1099-G from the NY State Department of Labor website or call them and request that they send it.